

UNIT 51 DEBRIEFING

(Blueprint 30 — 4/1/91)

UNIT CERTIFICATION

Statement of Completion

_____ has satisfactorily completed on-the-job training in the duty or duties of this Unit under the conditions described below and in accordance with the overall standard(s) for this Unit.

Duty	Debrief offerors at their request.
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Conditions	Given the solicitation, PNM, technical evaluations, source selection reports, and proposals.
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Overall Standard(s)	Disclose no information that must be kept confidential (e.g., proprietary data). Present the basis for not awarding to unsuccessful offerors, in terms of evaluation factors from the solicitation. Disclose other information required by the FAR. Provide any other information that will help the offeror(s) submit better proposals in the future. Tactfully answer all questions from vendor representatives.
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Evaluator

Name

Title

Date

UNIT 51 DEBRIEFING

DOCUMENTATION OF OJT ASSIGNMENT(S)
Description of Assignment:
Evaluation:
Completion Date:

UNIT 51 DEBRIEFING

Policies

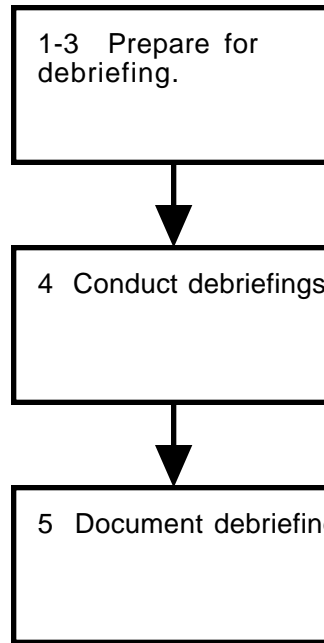
<i>FAR</i>	<i>Agency Suppl.</i>	<i>Subject</i>
13.106-2(c)(3)		Debriefings under SAT
15.1003		Debriefing of unsuccessful offerors.
35.008(d)		R&D debriefings.

Other KSA's

1. Skill at conducting and controlling meetings, including dealings with varying degrees of negative attitudes on the part of offerors.

Other Policies and References (Annotate As Necessary):

DEBRIEFING




UNIT 51 DEBRIEFING

Tasks

Related Standards


1 Determine whether to debrief an offeror.	2. Only debrief if a debriefing is requested. Under SAT, debrief only if award was based on factors under price.
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Requests for Debriefings


 Offerors (including awardees — not just the unsuccessful) may request debriefings whenever award is on the basis of competitive proposals, whether or not the contracting officer conducted discussions and whether or not award was on price and price related factors alone. [§15.1004, FAC 90-31, Case 94-701]

2. Determine the method of debriefing.	
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Conducting Debriefings

 Debriefings can be by electronic or any other method acceptable to the contracting officer. [§15.1004, FAC 90-31, Case 94-701]

3. Identify and notify Government participants in the debriefing. <ul style="list-style-type: none"> • Brief Government personnel on their roles. • Chair and lead the Government team. 	3. Under SAT, ordinarily only the contracting officer debriefs.
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 Contracting officers are responsible for chairing debriefings (unless unavailable, in which case the contracting officer may designate a representative to serve as the chair with approval from an individual who is a level above the contracting officer). “Individuals actually responsible for the evaluations shall provide support”. [§15.1004, FAC 90-31, Case 94-701]


UNIT 51 DEBRIEFING

Tasks

Related Standards

<p>3. Prepare for debriefing.</p>	<p>3 & 4. For awards under SAT, only provide a brief explanation of the basis for the contract award decision (see 15.1002(c)(2)).</p> <p>Over SAT, present an accurate and complete position on all issues that may arise during the debriefing session.</p> <p>Accurately:</p> <ul style="list-style-type: none"> • Identify the overall evaluated cost and technical rating of the successful and debriefed offerors. • Identify the overall ranking of all offerors when any ranking was developed by the agency during the source selection. • Summarize the rationale for award. • For commercial end items delivered under the contract, identify the make and model of the item being provided by the successful offeror. • Prepare reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed. <p>Identify and do not disclose any information exempt from release under the Freedom of Information Act including—</p> <ul style="list-style-type: none"> • Trade secrets; • Privileged or confidential manufacturing processes and techniques; and • Commercial and financial information that is privileged or confidential, including cost breakdowns, profit, indirect cost rates, and similar information.
<p>4. Conduct debriefings.</p> <ul style="list-style-type: none"> • Short opening. • Question and answer session. 	

Debriefing Do's and Don'ts

 Previously, the FAR required only that the Government share its evaluation of the significant weaknesses or deficiencies in the offeror's proposal. In addition, the Government team must at minimum now provide information on:

- The overall evaluated cost to the Government and technical rating of the successful offeror and the debriefed offeror, if applicable.*

UNIT 51 DEBRIEFING


Tasks

Related Standards


- The overall ranking of all offerors when any ranking was developed by the agency during the source selection.*
- A summary of the rationale for award.*
- For commercial end items delivered under the contract, the make and model of the awardee's deliverable.*
- Reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations, and other applicable authorities were followed.

(* do not apply to A&E contracts)

Purpose -- to facilitate frank and open discussions leading to better proposals on future procurements. In fact, the FAR never prohibited COs from providing the above information. The difference is that providing such information is now mandatory. COs will need to budget more time for debriefings. [§15.1004 and §36.607(b), FAC 90-31, Case 94-701]


 However, you still may NOT provide point by point comparisons of the debriefed offeror's proposal with those of other offerors. Moreover, you still may NOT reveal any information exempt from release under the Freedom of Information Act, including—

- Trade secrets.
- Privileged or confidential manufacturing processes and techniques.
- Commercial and financial information that is privileged or confidential, including cost breakdowns, profit, indirect cost rates, and similar information. [§15.1004, FAC 90-31, Case 94-701, CSW Unit 51, Tasks 3-4]

 The FAR also requires contracting officers to protect the names of individuals providing reference information about an offeror's past performance. [§15.1004, FAC 90-26]

5. Document debriefing session.	5. An accurate and complete record is on file.
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Summarizing the Debriefing for the Record

 You must prepare an “official” summary of the debriefing for the contract file. The FAR doesn't detail the contents of this summary. It could take the form of a memorandum for the record. Include a copy of the script, if you have such. Also include a list of questions and the provided answers. [§15.1004, FAC 90-31, Case 94-701]

UNIT 51 DEBRIEFING

Tasks

Related Standards

6. Upon issuance of a new solicitation or request for BAFOs on the protested contract award, provide information from the debriefing to all offerors. <ul style="list-style-type: none">• Information on the successful offeror's proposal provided in the debriefings.• Other nonproprietary information that would have been provided to the original offerors.	6. This information must be provided only if the issuance is within one year of contract award.
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Availability of Information from Debriefings to Prospective Offerors

☞ If, within one year of the protested contract award, you issue a new solicitation or request for BAFOs, make the following information available to all prospective offerors:

- Information on the successful offeror's proposal provided in any debriefings on the original award.
- Other nonproprietary information that would have been provided to original offerors.

Purpose: To ensure that an offeror debriefed is not an offeror with an unfair competitive edge. You can comply with this policy by making available the official written summary of any one of the actual debriefings — after expunging proprietary information on the debriefed offeror's proposal. You can either provide such information with the new solicitation or notify all offerors that the information is available at a specified location. [§15.1004, FAC 90-31, Case 94-701]